

Biodefense – A Global Market Overview

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Abstracts

Biodefense Market Trends and Outlook

Biodefense refers to a comprehensive strategy to safeguard against biological threats, including bioterrorism, biological warfare agents, and emerging infectious diseases. It encompasses a range of actions aimed at preventing, detecting, and responding to biological attacks or outbreaks. These actions include developing and deploying medical countermeasures like vaccines and therapeutics, enhancing surveillance systems, implementing biosecurity measures, and establishing emergency response protocols. Biodefense aims to reduce the impact of biological agents and ensure readiness for potential biological emergencies. This requires collaboration among bioscience labs, hospitals, customs, and public health sectors to prevent the use of dangerous pathogens and toxins.

The global Biodefense market is estimated at US\$18.2 billion in 2024 and is anticipated to register a CAGR of 8.6% during the 2024-2030 analysis period and stand at a projected US\$29.9 billion by 2030.

The Biodefense market is driven by technological advancements, rising global health hazards, and substantial government investments. Key drivers include the rapid development of next-generation vaccines and treatments; with artificial intelligence (AI) and machine learning (ML) enhancing early detection and response systems; advances in biodetection technology and point-of-care diagnostics improve outbreak response and early warning capabilities; biosecurity measures are strengthening research facilities and high-risk sectors to prevent pathogen spread; collaborative efforts between governments, academia, and businesses accelerate R&D and technology transfer; and increased government funding, prompted by the threats of bioterrorism and pandemics, fuels market expansion. The COVID-19 pandemic has heightened awareness of healthcare vulnerabilities, driving a focus on bio-surveillance, vaccine development, and

emergency response mechanisms. Climate change and global travel increase zoonotic disease risks, further fueling market growth.

Biodefense Regional Market Analysis

In 2024, North America, led by the U.S., dominated the biodefense market with a 46% share due to significant government investment, robust R&D capabilities, and a strong emphasis on national security. The U.S. government's initiatives, such as the BioShield Act, and the presence of major industry players have bolstered this position. Conversely, the Asia Pacific region is poised to grow rapidly, with a forecast CAGR of 10.5% from 2024-2030, driven by increased R&D investments and rising biothreat incidents. Countries like China, India, Japan, and South Korea are enhancing biodefense capabilities and investing heavily in public health preparedness, making the Asia Pacific the fastest-growing market segment.

Biodefense Market Analysis by Product Type

The anthrax segment leads the market, holding a notable share of 27.8% in 2024. This is attributed to its significant public health impact and ease of dispersion. Anthrax, caused by the *Bacillus anthracis* bacterium, poses a major bioterrorism threat due to its spore form, which can endure lengthy periods in the environment and spread easily. This segment sees substantial investments in vaccines and countermeasures, driven by past bioterrorism events and ongoing concerns. On the other hand, the 'Other Products' segment, which includes diseases such as Influenza, Viral Hemorrhagic Fevers, Ebola, Zika, and others, is expected to grow the fastest with a CAGR of 10.5% from 2024 to 2030. This rapid growth is propelled by the recent rise in infections and the development of new vaccines and treatments for diseases like Zika, Ebola, and Nipah as companies strive to tackle these emerging threats.

Biodefense Market Analysis by Application

The Military segment is projected to hold the largest market share at 64.5% in 2024, driven by substantial government investment in advanced technologies, research, and medical countermeasures to protect national security. The high perceived risk of biological threats and the strategic importance of military preparedness drive extensive funding and development efforts, ensuring robust defenses against potential bioterrorism and biological attacks. Conversely, the Civilian segment is expected to grow rapidly with a CAGR of 9.1% from 2024 to 2030, due to rising biological threats from terrorist organizations. This growth reflects heightened government efforts and

research focused on protecting civilians from potential biological attacks and emerging viruses.

Biodefense Market Analysis by End-User

The hospitals and clinics segment dominates the biodefense market with a 47.1% share in 2024 and is projected to record the fastest CAGR of 9.2% from 2024-2030. This is due to their critical role in managing and treating biological attacks, requiring advanced infrastructure, protective equipment, and diagnostic tools. Their capacity to handle mass casualties and enhance biodefense preparedness drives their dominant market position. The 'Other End Users' segment, which includes research organizations, biotechnology firms, and government agencies, is experiencing significant market growth driven by increased investment in biodefense research and development, leading to robust performance.

Biodefense Market Report Scope

This global report on Biodefense analyzes the market based on product, application, and end users. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

Base Year: 2023

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 15+

Biodefense Market by Geographic Region

North America (The United States, Canada, and Mexico)

Europe (Germany, France, The United Kingdom, Spain, Italy, and Rest of

Europe)

Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)

South America (Brazil, Argentina, and Rest of South America)

Rest of World

Biodefense Market by Product

Anthrax

Smallpox

Botulism

Radiation/Nuclear

Others (Including Influenza, Plague, Cholera, Food Poisoning, Viral Hemorrhagic Fevers, Brucellosis, Glanders, Melioidosis, Tularemia, Viral Encephalitis, Ebola Virus, Zica Virus, Nipah Virus, and Hantavirus)

Biodefense Market by Application

Military

Civilian

Biodefense Market by End User

Hospitals and Clinics

Ambulatory Care Centers

Other End Users (Including Research Organizations, Pharmaceutical and Biopharmaceutical Companies, Government Agencies, and Emergency

Responders)

Contents

PART A: GLOBAL MARKET PERSPECTIVE

1. INTRODUCTION

Product Outline

Biodefense Defined

Biodefense Products

Anthrax

Smallpox

Botulism

Radiation/Nuclear

Other Products

Biodefense Applications

Military

Civilian

Biodefense End Users

Hospitals and Clinics

Ambulatory Care Centers

Other End Users

2. Key Market Trends

3. Key Global Players

Alnylam Pharmaceuticals Inc

Altimune Inc

Bavarian Nordic

Dynavax Technologies Corporation

Dynport Vaccine Company

Elusys Therapeutics

Emergent Biosolutions

GlaxoSmithKline (UK)

Ichor Medical Systems

Ology Bioservices

Sanofi

SIGA Technologies

Soligenix

Statera BioPharma, Inc.

Xoma Corporation

4. Key Business & Product Trends

5. Global Market Overview

Global Biodefense Market Overview by Product
Biodefense Product Type Market Overview by Global Region
Anthrax
Smallpox
Botulism
Radiation/Nuclear
Other Products
Global Biodefense Market Overview by Application
Biodefense Application Market Overview by Global Region
Military
Civilian
Global Biodefense Market Overview by End User
Biodefense End User Market Overview by Global Region
Hospitals and Clinics
Ambulatory Care Centers
Other End Users

PART B: REGIONAL MARKET PERSPECTIVE

Global Biodefense Market Overview by Geographic Region
REGIONAL MARKET OVERVIEW
6. North America
North American Biodefense Market Overview by Geographic Region
North American Biodefense Market Overview by Product
North American Biodefense Market Overview by Application
North American Biodefense Market Overview by End User
Country-wise Analysis of North American Biodefense Market
The United States
United States Biodefense Market Overview by Product
United States Biodefense Market Overview by Application
United States Biodefense Market Overview by End User
Canada
Canadian Biodefense Market Overview by Product
Canadian Biodefense Market Overview by Application
Canadian Biodefense Market Overview by End User
Mexico
Mexican Biodefense Market Overview by Product
Mexican Biodefense Market Overview by Application
Mexican Biodefense Market Overview by End User

7. Europe

European Biodefense Market Overview by Geographic Region

European Biodefense Market Overview by Product

European Biodefense Market Overview by Application

European Biodefense Market Overview by End User

Country-wise Analysis of European Biodefense Market

Germany

German Biodefense Market Overview by Product

German Biodefense Market Overview by Application

German Biodefense Market Overview by End User

France

French Biodefense Market Overview by Product

French Biodefense Market Overview by Application

French Biodefense Market Overview by End User

The United Kingdom

United Kingdom Biodefense Market Overview by Product

United Kingdom Biodefense Market Overview by Application

United Kingdom Biodefense Market Overview by End User

Spain

Spanish Biodefense Market Overview by Product

Spanish Biodefense Market Overview by Application

Spanish Biodefense Market Overview by End User

Italy

Italian Biodefense Market Overview by Product

Italian Biodefense Market Overview by Application

Italian Biodefense Market Overview by End User

Rest of Europe

Rest of Europe Biodefense Market Overview by Product

Rest of Europe Biodefense Market Overview by Application

Rest of Europe Biodefense Market Overview by End User

8. Asia-Pacific

Asia-Pacific Biodefense Market Overview by Geographic Region

Asia-Pacific Biodefense Market Overview by Product

Asia-Pacific Biodefense Market Overview by Application

Asia-Pacific Biodefense Market Overview by End User

Country-wise Analysis of Asia-Pacific Biodefense Market

Japan

Japanese Biodefense Market Overview by Product

Japanese Biodefense Market Overview by Application

Japanese Biodefense Market Overview by End User

China

Chinese Biodefense Market Overview by Product

Chinese Biodefense Market Overview by Application

Chinese Biodefense Market Overview by End User

India

Indian Biodefense Market Overview by Product

Indian Biodefense Market Overview by Application

Indian Biodefense Market Overview by End User

South Korea

South Korean Biodefense Market Overview by Product

South Korean Biodefense Market Overview by Application

South Korean Biodefense Market Overview by End User

Rest of Asia-Pacific

Rest of Asia-Pacific Biodefense Market Overview by Product

Rest of Asia-Pacific Biodefense Market Overview by Application

Rest of Asia-Pacific Biodefense Market Overview by End User

9. South America

South American Biodefense Market Overview by Geographic Region

South American Biodefense Market Overview by Product

South American Biodefense Market Overview by Application

South American Biodefense Market Overview by End User

Country-wise Analysis of Asia-Pacific Biodefense Market

Brazil

Brazilian Biodefense Market Overview by Product

Brazilian Biodefense Market Overview by Application

Brazilian Biodefense Market Overview by End User

Argentina

Argentine Biodefense Market Overview by Product

Argentine Biodefense Market Overview by Application

Argentine Biodefense Market Overview by End User

Rest of South America

Rest of South American Biodefense Market Overview by Product

Rest of South American Biodefense Market Overview by Application

Rest of South American Biodefense Market Overview by End User

10. Rest of World

Rest of World Biodefense Market Overview by Product

Rest of World Biodefense Market Overview by Application

Rest of World Biodefense Market Overview by End User

PART C: GUIDE TO THE INDUSTRY

PART D: ANNEXURE

1. RESEARCH METHODOLOGY
2. FEEDBACK

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